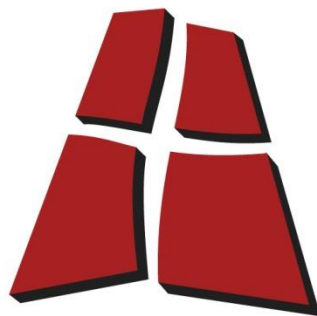


2015

FES

Faculty Evaluation System



AZUSA PACIFIC
UNIVERSITY

Activity Insight User Guide for Supervisors

Provided by the Center for Teaching, Learning, and Assessment

V0820-2015

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The Faculty Evaluation System (FES) depends largely on the ability of the department chair (or other supervisor) and dean to monitor faculty participation and to maintain a schedule of annual review.

The following pages are designed to help supervisors with the logistical details of assigning scores and approving documents via Activity Insight. This manual is specific to the role of a supervisor and should be read as a supplement to the Basic User Manual.

Manage Data Screens

In Activity Insight there are screens that are called Manage Data screens. These screens were built for chairs, Deans, supervisors, and administrative users to approve goal-setting reports, enter workload and evaluative data about their faculty, and submit contract recommendations. These screens allow the faculty member to see the data that has been submitted.

The following screens in Activity Insight are “manage data” screens:

Web Screen	Who Completes the Screen					
	Faculty	Dean, or Designate	Chair, Supervisors	OFE	OFI	Uploaded data
APU Historical Data				X		X
Annual Workload Agreement*		X	X	X ¹		
Annual Supervisor Approval of Goals and Expectations*	X		X			
Annual IDEA Scores				X		X
Annual Library Classroom Evaluation				X		X
Annual Servant Leader Scores				X		X
Annual Supervisor Feedback and Evaluation of Faculty			X			
Annual Dean Feedback and Evaluation of Faculty		X ³				
Record Faith Integration Scores					X ²	
Extended Contract Recommendation		X	X			
Rank Promotion Recommendation		X	X			

*These screens have *fields* that are Manage Data user and have elements requiring faculty data input on the same page.

1 If your school needs additional help in inputting these agreements, OFE will assist

2 Primary responsibilities for this screen are assigned to OFI; OFE will assist if needed

3 If Dean is direct supervisor ratings will be recorded in the “Annual Supervisor Feedback and Evaluation of Faculty” page

Role Assignments

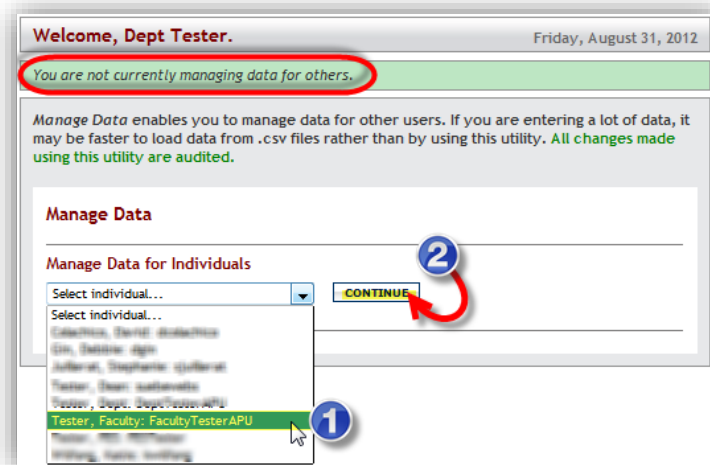
Role assignments (e.g., department chair) are based on leadership position. If you find that you do not have access to a user for whom you need to manage data, contact the Activity Insight Coordinator in the Office of Faculty Evaluation at facultyevaluation@apu.edu and request access.

Manage Data for Other Users



In Activity Insight, supervisors will need access to view the materials of the people they supervise. This is accomplished through the **Manage Data** link.

To access a faculty member's account, choose the **Manage Data** menu item on the left navigation menu. From there you will be taken to a summary screen where you can select the user you want to manage.

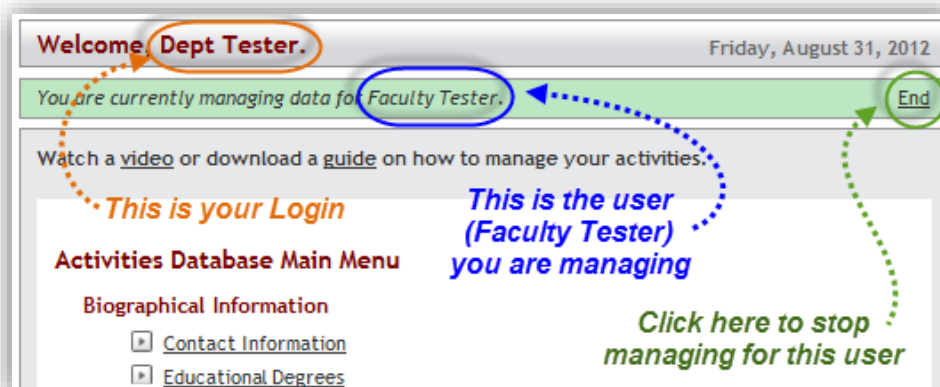


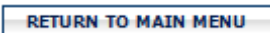
1. Choose from the drop down menu the faculty member's name to manage.

Note: The drop down will only have the users you have been given permission to manage. If you need to manage the data of a user who is not in the drop down menu list, contact Faculty Evaluation facultyevaluation@apu.edu to request access.

2. After you have selected the user, click the **CONTINUE** button.

The summary screen will change to look something like the screen shot below. The green area that says "You are currently managing data for....." informs you that you are managing data for another user. If the green bar is not displayed, then you are not in the user's manage data function. Once manage data is activated, supervisors can view data, enter scores, provide feedback, submit recommendations, or record approvals for the user selected.



TIP: While you are managing another user's data, *do not* click on the left navigational menu. If you do, you will turn off the manage data function for that user, and you will need to reestablish manage data for that user again. To avoid this, always use  button.

Approving Goals and Expectations Report

After meeting with supervisors in June or July to discuss their goals and expectations, each faculty member will generate a Goals and Expectations Report and upload it to the link titled “**Annual Supervisor Approval of Goals and Expectations.**” Supervisors should review and approve faculty goals no later than August 30.

Steps to Approve Goals and Expectations Report

1. The faculty member will complete the top section and upload the report. Once completed, they will contact their primary supervisor via email.



Welcome, Dept Tester. Monday, April 29, 2013

You are currently managing data for FacultyDemo Tester. [End](#)

Activities Database

Annual Supervisor Approval of Goals and Expectations [RETURN TO MAIN MENU](#)

[SAVE AND RETURN](#) [SAVE AND ADD ANOTHER](#) [RETURN \(CANCEL\)](#)

Academic year for which these goals apply: 2010-2011

Date of Goals and Expectations Meeting: June 3, 2010

1

Annual Goals and Expectations Report - After meeting with your supervisor to discuss goals and expectations, run a Goals and Expectations Report and upload it here no later than Aug 15.

Upload Annual Goals and Expectations Report: [Download "sample goals and expectat..."](#) [Delete file](#) [Click link to view report](#)

After reviewing your report, notify your supervisor that it is ready for approval

Faculty Reviewed: Yes ☐ First Name: Faculty Last Name: Tester Date: June 1, 2010

Chair Approved **2**: Yes ☐ First Name: Department Chair Last Name: Tester Date: June 3, 2010

Supervisor Comments **3**: On track for rank promotion

Dean Approved **4**: ☐ First Name: Last Name: Date: ,

Dean Comments **5**:

[SAVE AND RETURN](#) [SAVE AND ADD ANOTHER](#) [RETURN \(CANCEL\)](#)

2. In manage data function, the primary supervisor will approve the Goals and Expectation Report by completing the section for Chair approval.

3. Supervisors have the option of adding comments as needed. Faculty will be able to view comments. Once approval is entered, click “**SAVE AND RETURN.**”

4. If the secondary supervisor wishes to be involved, he or she will approve the Goals and Expectation Report by completing the section for Dean approval.

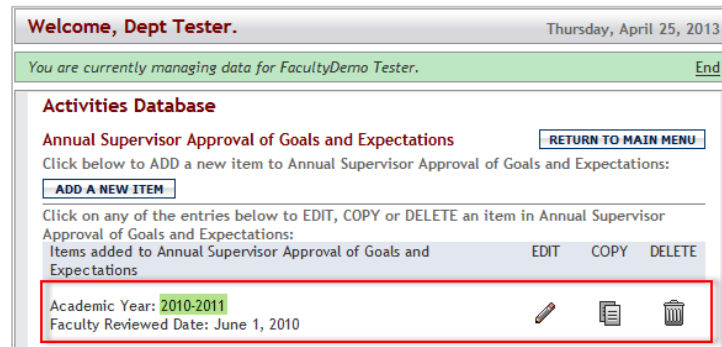
5. Similarly, Deans have the option to include comments here as well. Once approval is entered, click “**SAVE AND RETURN.**”

NOTE: If at any point a supervisor wishes for changes to be made to a report, the faculty member must delete the stored file, adjust the goals accordingly, and re-submit (upload) the report.

Summary Screen Views of Goals and Expectations Report

Once an action is taken on the **Annual Supervisor Approval of Goals and Expectations** page, the action will be summarized on the summary screen.

View 1: The **faculty** member has uploaded a report or elements of a report for 2010-2011, but it has not been approved.



Welcome, Dept Tester. Thursday, April 25, 2013

You are currently managing data for FacultyDemo Tester. End

Activities Database

Annual Supervisor Approval of Goals and Expectations RETURN TO MAIN MENU

Click below to ADD a new item to Annual Supervisor Approval of Goals and Expectations:

ADD A NEW ITEM

Click on any of the entries below to EDIT, COPY or DELETE an item in Annual Supervisor Approval of Goals and Expectations:

Items added to Annual Supervisor Approval of Goals and Expectations	EDIT	COPY	DELETE
Academic Year: 2010-2011 Faculty Reviewed Date: June 1, 2010			

View 2: The **faculty** member has reviewed, and the **supervisor** has approved the Goals and Expectations Report.



Welcome, Dept Tester. Thursday, April 25, 2013

You are currently managing data for FacultyDemo Tester. End

Activities Database

Annual Supervisor Approval of Goals and Expectations RETURN TO MAIN MENU

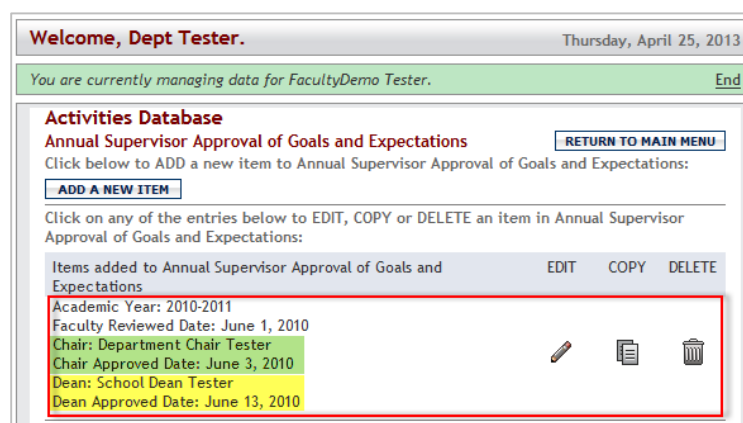
Click below to ADD a new item to Annual Supervisor Approval of Goals and Expectations:

ADD A NEW ITEM

Click on any of the entries below to EDIT, COPY or DELETE an item in Annual Supervisor Approval of Goals and Expectations:

Items added to Annual Supervisor Approval of Goals and Expectations	EDIT	COPY	DELETE
Academic Year: 2010-2011 Faculty Reviewed Date: June 1, 2010 Chair: Department Chair Tester Chair Approved Date: June 3, 2010			

View 3: The **faculty** member has reviewed, and the **supervisor** and **Dean** have approved the Goals and Expectations Report.



Welcome, Dept Tester. Thursday, April 25, 2013

You are currently managing data for FacultyDemo Tester. End

Activities Database

Annual Supervisor Approval of Goals and Expectations RETURN TO MAIN MENU

Click below to ADD a new item to Annual Supervisor Approval of Goals and Expectations:

ADD A NEW ITEM

Click on any of the entries below to EDIT, COPY or DELETE an item in Annual Supervisor Approval of Goals and Expectations:

Items added to Annual Supervisor Approval of Goals and Expectations	EDIT	COPY	DELETE
Academic Year: 2010-2011 Faculty Reviewed Date: June 1, 2010 Chair: Department Chair Tester Chair Approved Date: June 3, 2010 Dean: School Dean Tester Dean Approved Date: June 13, 2010			

Annual Supervisor Feedback and Evaluation of Faculty

Each June or July, as part of the performance appraisal, department chairs (or Deans if the faculty member being evaluated is a department chair) will provide evaluative feedback and submit an overall rating of effectiveness in Educator-Mentor, Scholar-Practitioner, and Servant-Leader. These ratings should be a reflection of how well the faculty member met the agreed-upon goals set forth in the goals and expectations meeting of the prior year, as well as whether faculty met University benchmarks. Ratings should be submitted no later than July 30 each year.

Advancement Portfolio Data

- ☐ [Annual IDEA Scores](#)
- ☐ [Annual Library Classroom Evaluation](#)
- ☐ [Annual Servant Leader Scores](#)
- ☐ [Annual Reports and Faculty Reflection](#)
- ☒ [Annual Supervisor Feedback and Evaluation of Faculty](#)
- ☐ [Annual Dean Feedback and Evaluation of Faculty \(Optional\)](#)
- ☐ [Faith Integration Scores](#)
- ☐ [Extended Contract Recommendation](#)
- ☐ [Rank Promotion Recommendation](#)

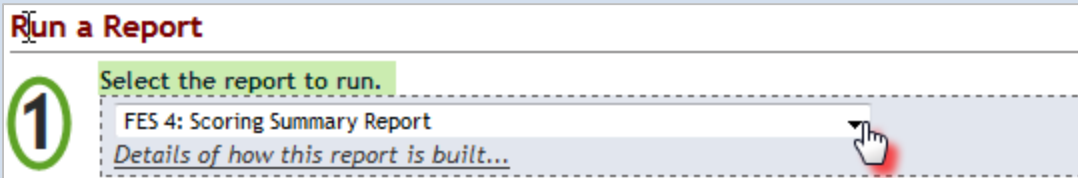
Running a Scoring Summary Report

Although supervisors can utilize the manage data function to view faculty data at various links within the **Advancement Portfolio Data** section of Activity Insight, the best way to review faculty performance from a given academic year is to run the **FES 4: Scoring Summary Report** for that user.



Click on the “**Run Custom Reports**” link in the navigation menu

1. Select from the drop down list the “FES 4: Scoring Summary Report.”



2. Date range: Each custom report has a set date range that accumulates the data needed for an FES report. This report can be viewed annually and/or across multiple academic years; make sure to select the correct starting and ending years. *The date range for the FES 4: Scoring Summary Report is Sept 1 to Aug 31*





Select who to include. Click the link that says “Click Here;” a pop-up window will appear.

3 Select who to include. [More Information >>](#)

Click here to select whose data to include.


Data selected: All

Include these accounts: Enabled Accounts Only   leave as is

Choose the **Individual** link to find the faculty member’s name and select the check box next to it. Then click SAVE.

Select who to include by clicking a heading below.

Department

Individual 

School

Select who to include by clicking a heading below.


Department

Individual select all | none

☐ Tester, Dean: facultyevaluation

☐ Tester, Dept: DeptTesterAPU

☐ Tester, Faculty: FacultyTesterAPU

☒ Tester, FacultyDemo: FDTester 



School

Check to see that the correct user has been selected. If there are additional names, Departments, or School, you will need to remove them to get a report that only lists the correct user.

3 Select who to include. [More Information >>](#)


Click here to select whose data to include.

Data selected: Tester, FacultyDemo: FDTester

Include these accounts: Enabled Accounts Only   leave as is

4. Select the format type: Adobe PDF

4 Select the file format. [More Information >>](#)

Adobe PDF 

5. Select page size from dropdown

5 Select the page size. [More Information >>](#)

Letter 

6. Click **BUILD REPORT** button and save the report to your computer.

5 Select the page size. [More Information >>](#)

Letter 

6 

An Overview of the Scoring Summary Report

The Scoring Summary Report will provide all summary data. When multiple academic years are included, data is sorted by each section and will also display a multi-year, cumulative average when appropriate.

The report includes the following data:

Teaching Scores

For faculty using IDEA, the report will identify the average annual scores for Progress on Relevant Objectives, Overall Excellence of the Teacher, and a Teaching Effectiveness Score (TES), which represents the annual average of the two aforementioned scores.

For library faculty, the report will identify the average score on the library classroom evaluation form.

Servant Leader Scores

The report will display the annual grouped average from the Department Member Collegiality Survey (SL2).

Goals and Expectations Report

The report will produce a link to the faculty member's Goals and Expectations Report, reminding the supervisor what goals were set.

Activity Report

There will be a link to the Activity Report, enabling the supervisor to determine faculty activity in all of the roles.

Faculty Reflection

Faculty are expected to reflect on their performance in the primary roles. Their narrative will be included.

Supervisor Rating and Feedback

Once submitted, the supervisor's comments and ratings will appear in this report.

Faith Integration Scores

Once faith integration materials have been submitted and scored, scores will display in this report.


After supervisors have reviewed the Scoring Summary Report, they can enter ratings and feedback for the faculty member, as identified on the following page.

Steps to Provide Annual Feedback

After supervisors have reviewed the faculty member's performance, they should provide feedback and ratings in the 3 roles. Turn on data management for the user being evaluated, click on the **"Annual Supervisor Feedback and Evaluation of Faculty"** link in the **Advancement Portfolio Data** section and follow the steps below.

Click the **ADD A NEW ITEM** button.

- Fill in the academic year being evaluated, supervisor name (first and last) and position, and date of performance review meeting.
- Rate the faculty member's performance in each of the roles using the drop down list.



Annual Performance Review by Supervisor

Academic year that is being evaluated **R** 2010-2011

Name of Supervisor giving review **R** Dr. Chair Supervisor

Leadership position of Supervisor **R** Department Chair

Date of performance review meeting **R** June 15, 2011

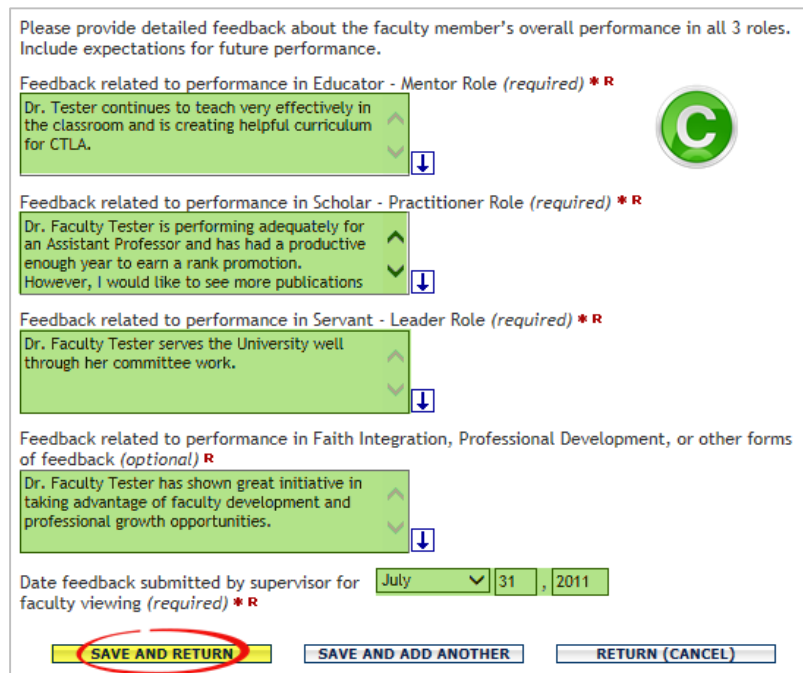
After reviewing the faculty member's Teaching Report, Activity Report, Servant Leader scores, and other related data, rate the faculty member's performance in each of the roles below.

Educator - Mentor Effectiveness **R** Meets Expectations

Scholar - Practitioner Effectiveness **R** Meets Expectations

Servant - Leader Effectiveness **R** Meets Expectations

- Please provide detailed feedback about the faculty member's overall performance in all 3 roles and in faith integration and professional development as appropriate. Include expectations for future performance. **NOTE:** Three text fields and the submission date are required on this screen.



Please provide detailed feedback about the faculty member's overall performance in all 3 roles. Include expectations for future performance.

Feedback related to performance in Educator - Mentor Role (required) *** R**

Dr. Tester continues to teach very effectively in the classroom and is creating helpful curriculum for CTLA.

Feedback related to performance in Scholar - Practitioner Role (required) *** R**

Dr. Faculty Tester is performing adequately for an Assistant Professor and has had a productive enough year to earn a rank promotion. However, I would like to see more publications

Feedback related to performance in Servant - Leader Role (required) *** R**

Dr. Faculty Tester serves the University well through her committee work.

Feedback related to performance in Faith Integration, Professional Development, or other forms of feedback (optional) **R**

Dr. Faculty Tester has shown great initiative in taking advantage of faculty development and professional growth opportunities.

Date feedback submitted by supervisor for faculty viewing (required) *** R** July 31, 2011

SAVE AND RETURN **SAVE AND ADD ANOTHER** **RETURN (CANCEL)**

When you are finished, click the **"SAVE AND RETURN"** button. Faculty will be able to view ratings and comments after saving.

Annual Dean Feedback and Evaluation of Faculty

There is also a link for Deans to provide general feedback to faculty about their annual performance, but it does not involve the issuance of ratings in the 3 roles. This link is NOT used when the faculty member being evaluated is a department chair. Instead, Deans will use the process identified on pages 6-9 when rating their department chairs in the 3 roles. If Deans wish to submit feedback using this link, they need to utilize the **Manage Data** function before clicking on the link titled “**Annual Dean Feedback and Evaluation of Faculty**.”

Annual Dean Feedback and Evaluation of Faculty [RETURN TO MAIN MENU](#)

[SAVE AND RETURN](#) [SAVE AND ADD ANOTHER](#) [RETURN \(CANCEL\)](#)

If desired, Deans may choose to review annual faculty data and provide feedback below.

Academic year that is being evaluated **R**

Dean's Name **R**

Leadership position of Supervisor **R**

Annual comments from Dean (optional) **R**

Date feedback submitted by supervisor for faculty viewing **R** ,

[SAVE AND RETURN](#) [SAVE AND ADD ANOTHER](#) [RETURN \(CANCEL\)](#)

After submitting feedback, click the “**SAVE AND RETURN**” button. Faculty will be able to view comments after saving.

Submitting Extended Contract and Rank Promotion Recommendations

The purpose of the **Extended Contract and Rank Promotion Recommendation** screens is to record the recommendations of the supervisors and, when applicable, the Term Tenure and Rank Promotion Committee.

Both department chair and Dean will enter recommendations (unless the faculty member is a department chair, in which case only the Dean will respond). The input fields on both screens are similar and require a report upload by the supervisor.

Advancement Portfolio Data

- ☐ [Annual Supervisor Approval of Goals and Expectations](#)
- ☐ [Annual IDEA Scoring Sheet](#)
- ☐ [Annual Library Classroom Evaluation](#)
- ☐ [Annual Servant Leader Scores](#)
- ☐ [Annual Reports and Faculty Reflection on Goal Attainment and Performance](#)
- ☐ [Annual Supervisor Feedback and Evaluation of Faculty](#)
- ☐ [Annual Dean Feedback and Evaluation of Faculty](#)
- ☐ [Record Faith Integration Scores](#)
- ☒ [Extended Contract Recommendation](#)
- ☒ [Rank Promotion Recommendation](#)

Extended Contract Recommendation

Prior to completing this screen, supervisors will need to generate, view, and save a multi-year **Scoring Summary Report** for the faculty member under consideration, so that they can verify that the following criteria have been met across the appropriate number of years (3 or 5, depending on contract length). See page 6 for instructions on generating this report. Be sure to include the correct years of data collection and save the report as a PDF to your computer. The following prompts are completed in the Extended Contract Recommendation screen once to summarize multiple years of performance. The data needed to answer these questions are found on the **Scoring Summary Report**.

- Has the minimum TES score been met? -- Yes/No
- Have the university standards and/or higher individual requirements for scholarship been met? -- Yes/No
- Has the minimum SL score been met? -- Yes/No
- Has there been a pattern of met expectations in Educator - Mentor? -- Yes/No
- Has there been a pattern of met expectations in Scholar - Practitioner? -- Yes/No
- Has there been a pattern of met expectations in Servant - Leader? -- Yes/No
- Has the appropriate faith integration score been achieved? -- Yes/No
- Contract Units for this recommended contract
 - 24 Units (9-month), 27 Units (10-month), 29 Units (11 month), 32 Units (12 month)
- Details related to contract units

Additionally, each supervisor will complete these additional fields in the "Contract Recommendation" box.

- Name and Leadership position
- Extended Contract Recommendation
 - Non-Renewal of Contract, One-year Conditional Contract, One-year Contract, 3-year Contract, Term-Tenure (5-year) Contract
- Date of extended contract recommendation submission
- If applicable, any comments justifying extended contract recommendation and/or conditions associated with recommendation.

Recording an Extended Contract Recommendation

If you are the first person to submit a recommendation (typically a department chair), follow the steps below. If you are the second or third person to submit a contract recommendation (typically a Dean and TTRP), go to the section titled “**Recording an Extended Contract Recommendation – Second or Third Recommendation**”

The following are the steps the first supervisor will need to follow to make an extended contract recommendation.

1. Run a scoring **FES 4: Scoring Summary Report** for the relevant data collection years. Save the report on your computer.
2. Click on the “**Manage Data**” link on the left menu bar and select the faculty member.
(See “Manage Data for Other Users” on pg. 3 for instructions on user data management.)
3. Go to the **Advancement Portfolio Data** section and click on the link titled “**Extended Contract Recommendation.**”
4. Click **ADD A NEW ITEM**
5. Fill in the academic year this contract recommendation takes effect, supervisor name (first and last), and position.

Note: The academic year this contract recommendation takes effect is the first academic year of the faculty member’s new contract. For example, if you are making a recommendation in Dec. 2013, then the contract will take effect in 2014-2015.

6. Upload the faculty member’s multi-year Scoring Summary Report (generated by the supervisor) by clicking on the link titled “Store file”

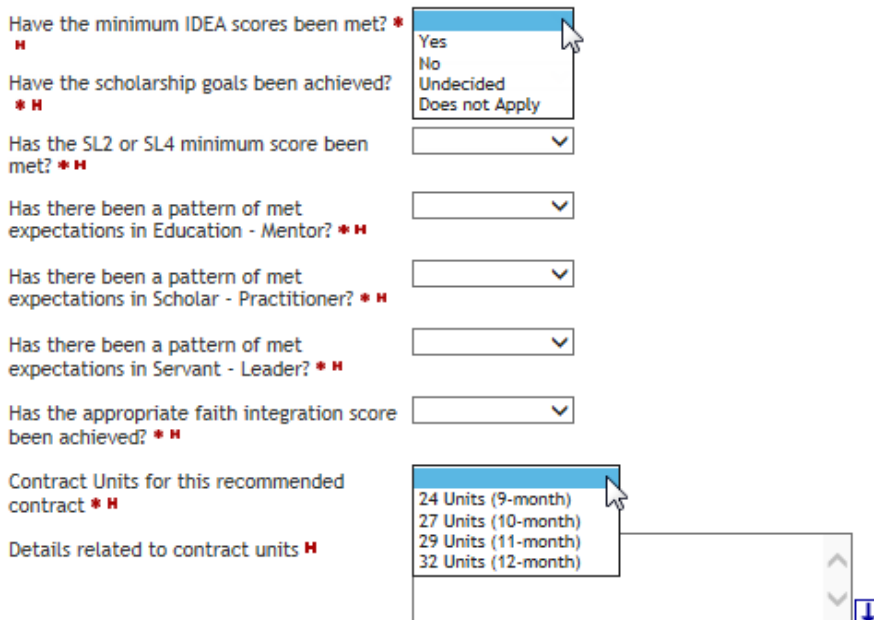


then click the **Browse** button to navigate to the report you have saved on your computer.



7. Using the Scoring Summary Report as a guide, please respond to the following prompts prior to making a recommendation

Using data from the multi-year Scoring Summary Report, please respond to the following prior to making a recommendation



Have the minimum IDEA scores been met? * **H**

Have the scholarship goals been achieved? * **H**

Has the SL2 or SL4 minimum score been met? * **H**

Has there been a pattern of met expectations in Education - Mentor? * **H**

Has there been a pattern of met expectations in Scholar - Practitioner? * **H**

Has there been a pattern of met expectations in Servant - Leader? * **H**

Has the appropriate faith integration score been achieved? * **H**

Contract Units for this recommended contract * **H**

Details related to contract units **H**

- The next section is outlined in its own box and is titled “Contract Recommendation.” Enter your name, leadership position, your recommendation, the date of your recommendation (today’s date), and any comments concerning your recommendation.

Contract Recommendation

Name of person giving extended contract recommendation * **H**

Leadership position giving extended contract recommendation * **H**

Contract Recommendation * **H**

Comments justifying extended contract recommendation and/or conditions associated with recommendation **H**

Date contract recommendation submitted ,

Add another Contract Recommendation: **ADD**

- Click the “**SAVE AND RETURN**” button.

SAVE AND RETURN

SAVE AND ADD ANOTHER

RETURN (CANCEL)

Recording an Extended Contract Recommendation – Second or Third Recommendation

After a primary supervisor (e.g., dept. chair) makes a contract recommendation, a second-level (e.g., Dean) supervisor adds his or her recommendation. When a faculty member is seeking a first term-tenure contract, a Term Tenure and Rank Promotion (TTRP) Committee recommendation will be added on its behalf by the Office of Faculty Evaluation.

- Click on the **Manage Data** link on the left menu bar and select the faculty member. (See “Manage Data for Other Users” on pg. 3 for instructions on user data management.)
- Go to the **Advancement Portfolio Data** section and click on the link titled “**EXTENDED CONTRACT RECOMMENDATION.**”
- Click on the existing record for the academic year the recommendation will take effect.

Items added to Extended Contract Recommendation EDIT COPY

<input type="checkbox"/>	2014-2015	Supervisor Name: Dr. Dept. Chair Tester Supervisor Leadership Position: Department Chair Recommendation Date from Supervisor: December 1, 2013	 
--------------------------	------------------	--	---

- Review the answers submitted by the primary supervisor.

5. Scroll to the of bottom the page and find the boxed-in section titled “Contract Recommendation”
6. To add a recommendation click on the Add button **ADD**

Contract Recommendation

Name of person giving extended contract recommendation * **H**

Leadership position giving extended contract recommendation * **H**

Contract Recommendation * **H**

Comments justifying extended contract recommendation and/or conditions associated with recommendation **H**

Date contract recommendation submitted , 2013

Add another Contract Recommendation: **ADD**

7. Enter your name, leadership position, your recommendation, the date of your recommendation (today's date), and any comments concerning your recommendation.

Contract Recommendation First Recommendation

Name of person giving extended contract recommendation * **H**

Leadership position giving extended contract recommendation * **H**

Contract Recommendation * **H**

Comments justifying extended contract recommendation and/or conditions associated with recommendation **H**

Date contract recommendation submitted , 2013

Contract Recommendation Second Recommendation

Name of person giving extended contract recommendation * **H**

Leadership position giving extended contract recommendation * **H**

Contract Recommendation * **H**

Comments justifying extended contract recommendation and/or conditions associated with recommendation **H**

Date contract recommendation submitted ,

Add another Contract Recommendation: **ADD**

8. When you are finished click the “**SAVE AND RETURN**” button.

SAVE AND RETURN **SAVE AND ADD ANOTHER** **RETURN (CANCEL)**

Once a second supervisor has submitted his or her recommendation, the response will appear on the summary screen.

Welcome, Dept Tester.Tuesday, November 5, 2013

You are currently managing data for FacultyDemo Tester.[End](#)

Activities Database

Extended Contract Recommendation[RETURN TO MAIN MENU](#)

[ADD A NEW ITEM](#)


Items added to Extended Contract Recommendation

EDIT

COPY

☐

2014-2015
Supervisor Name: Dr. Chair Tester
Supervisor Leadership Position: Department Chair
Recommendation Date from Supervisor: December 1, 2013
Supervisor Name: Dr. Dean Tester
Supervisor Leadership Position: Dean
Recommendation Date from Supervisor: December 1, 2013



Rank Promotion Recommendation

Prior to completing this screen, supervisors will need to generate, view, and save a multi-year **Scoring Summary Report** so that they can verify that the following criteria have been met across the appropriate number of years. See page 6 for instructions on generating this report. Be sure to include the correct years of data collection and save the report as a PDF to your computer. The following prompts are completed in the Rank Promotion Recommendation screen once to summarize multiple years of performance. The data needed to answer these questions are found on the **Scoring Summary Report**.

- Has the minimum TES score been met? -- Yes/No
- Have the university standards and/or higher individual requirements for scholarship been met? -- Yes/No
- Has the minimum SL score been met? -- Yes/No
- Has there been a pattern of met expectations in Educator - Mentor? -- Yes/No
- Has there been a pattern of met expectations in Scholar - Practitioner? -- Yes/No
- Has there been a pattern of met expectations in Servant - Leader? -- Yes/No
- Has the appropriate faith integration score been achieved? -- Yes/No
- If a promotion is being recommended, have the Handbook requirements associated with the promotion been verified? -- Yes/No

Additionally, supervisors will complete these additional sections.

- Name and Leadership position
- Rank Promotion Recommendation
 - No Promotion
 - Promotion to Assistant Professor
 - Promotion to Associate Professor
 - Promotion to Professor
- If applicable, any comments justifying rank promotion recommendation
- Date of rank promotion recommendation

Recording a Rank Promotion Recommendation

If you are the first person to submit a recommendation (typically a department chair), follow the steps below. If you are the second or third person to submit a contract recommendation (typically a Dean and TTRP), go to the section titled “**Recording a Rank Promotion Recommendation – Second or Third Recommendation**”

The following are the steps the first supervisor will need to follow to make a rank promotion recommendation.

1. Run a **FES 4: Scoring Summary Report** for the relevant data collection years. Save the report on your computer.
2. Click on the **MANAGE DATA** link on the left menu bar and select the faculty member. (See “Manage Data for Other Users” on pg. 3 for instructions on user data management.)
3. Go to the **Advancement Portfolio Data** section and click on the “**RANK PROMOTION RECOMMENDATION**” link.
4. Click **ADD A NEW ITEM**
5. Fill in the academic year the rank promotion takes effect, supervisor name (first and last), and position.
Note: The academic year this promotion recommendation takes effect is the first academic year of the faculty member’s new contract. For example, if you are making a recommendation in Dec. 2013, then the promotion will take effect in 2014-2015.

6. Upload the faculty member’s multi-year Scoring Summary Report (generated by the supervisor) by clicking on the link titled “Store file”

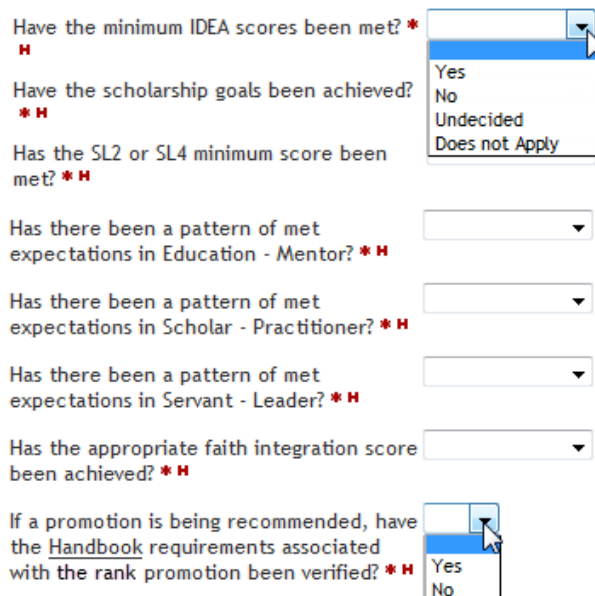


then click the **Browse** button to navigate to the report you have saved on your computer.



7. Using the Scoring Summary Report as a guide, please respond to the following prompts prior to making a recommendation

Using data from the multi-year Scoring Summary Report, please respond to the following prior to making a recommendation



Have the minimum IDEA scores been met? * **H**

Have the scholarship goals been achieved? * **H**

Has the SL2 or SL4 minimum score been met? * **H**

Has there been a pattern of met expectations in Education - Mentor? * **H**

Has there been a pattern of met expectations in Scholar - Practitioner? * **H**

Has there been a pattern of met expectations in Servant - Leader? * **H**

Has the appropriate faith integration score been achieved? * **H**

If a promotion is being recommended, have the Handbook requirements associated with the rank promotion been verified? * **H**

- The next section is outlined in its own box and is titled “Promotion Recommendation.” Enter your name, leadership position, your recommendation, the date of your recommendation (today’s date), and any comments concerning your recommendation.

Promotion Recommendation

Name of person giving rank promotion recommendation * **H**

Leadership position giving rank promotion recommendation * **H**

Rank Promotion Recommendation * **H**

Comments justifying rank promotion recommendation **H**

↑
↓

Date rank promotion recommendation submitted * **H** ,

Add another Promotion Recommendation: **ADD**

- Click the “**SAVE AND RETURN**” button.



SAVE AND RETURN
SAVE AND ADD ANOTHER
RETURN (CANCEL)

Recording a Rank Promotion Recommendation – Second or Third Recommendation

After a primary supervisor (e.g., dept. chair) makes a rank promotion recommendation, a second-level (e.g., Dean) supervisor adds his or her recommendation. When a faculty member is seeking a rank promotion to professor, a Term Tenure and Rank Promotion (TTRP) Committee recommendation will be added on its behalf by the Office of Faculty Evaluation.

- Click on the **Manage Data** link on the left menu bar and select the faculty member. (See “Manage Data for Other Users” on pg. 3 for instructions on user data management.)
- Go to the **Advancement Portfolio Data** section and click on the link titled “**RANK PROMOTION RECOMMENDATION.**”
- Click on the existing record for the academic year the recommendation will take effect.

Items added to Rank Promotion Recommendation EDIT COPY

<input type="checkbox"/>	<div style="background-color: #d9ead3; padding: 2px; margin-bottom: 5px;">2014-2015</div> <div> Supervisor Name: Dr. Chair Tester Supervisor Leadership Position: Department Chair Recommendation Date from Supervisor: December 1, 2013 </div>		
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- Review the answers submitted by the primary supervisor.

5. Scroll to the of bottom the page and find the boxed-in section titled “Promotion Recommendation”
6. To add a recommendation click on the Add button **ADD**

Promotion Recommendation ✕

Name of person giving rank promotion recommendation * **H**

Leadership position giving rank promotion recommendation * **H**

Rank Promotion Recommendation * **H**

Comments justifying rank promotion recommendation **H**

Date rank promotion recommendation submitted * **H** ,

Add another Promotion Recommendation: **ADD**

7. Enter your name, leadership position, your recommendation, any comments concerning your recommendation, and the date of your recommendation (today's date).

Promotion Recommendation *First Recommendation* ✕

Name of person giving rank promotion recommendation * **H**

Leadership position giving rank promotion recommendation * **H**

Rank Promotion Recommendation * **H**

Comments justifying rank promotion recommendation **H**

Date rank promotion recommendation submitted * **H** , ,

Promotion Recommendation *Second Recommendation* ✕

Name of person giving rank promotion recommendation * **H**

Leadership position giving rank promotion recommendation * **H**

Rank Promotion Recommendation * **H**

Comments justifying rank promotion recommendation **H**

Date rank promotion recommendation submitted * **H** ,

Add another Promotion Recommendation: **ADD**

8. When you are finished click the “**SAVE AND RETURN**” button.

Once a second supervisor has submitted his or her recommendation, the response will appear on the summary screen.

Welcome, Dept Tester.Tuesday, November 5, 2013

You are currently managing data for FacultyDemo Tester.[End](#)

Activities Database



Rank Promotion Recommendation[RETURN TO MAIN MENU](#)

[ADD A NEW ITEM](#)

Items added to Rank Promotion RecommendationEDITCOPY

☐

2014-2015
Supervisor Name: Dr. Chair Tester
Supervisor Leadership Position: Department Chair
Recommendation Date from Supervisor: December 1, 2013
Supervisor Name: Dr. Dean Tester
Supervisor Leadership Position: Dean
Recommendation Date from Supervisor: December 2, 2013



Entering and Editing Annual Workload Agreement

Although not used for FES, one of the ways that Activity Insight is used at the University level is to record all full-time faculty workloads. The data is typically entered by the School's Executive Assistant but can be delegated to a department assistant. The instructions are listed below.

1. Login to Activity Insight: home.apu.edu > Faculty Tab > Activity Insight link in middle of screen.
Admin users go to: home.apu.edu > Enterprise Menu, Self Service link > look for the Activity Insight link under the Faculty heading.¹

2. Click on **Manage Data** link (*admin users, skip this step*)



3. Choose the Faculty name from the dropdown list



then click



4. **IMPORTANT!** Check to see that you are managing data for the correct user. Look for the green section at the top of the web page that reads:

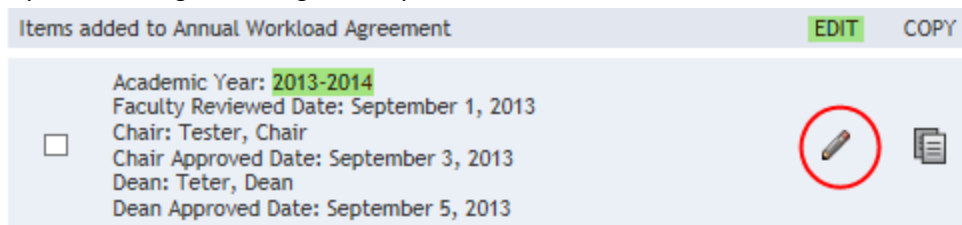
You are currently managing data for [FACULTY NAME].

[FACULTY NAME] = This should be the name of the faculty member for whom you are entering workload data.

5. Look for the **APU Information** section and click on the link that is titled: "[Annual Workload Agreement](#)"
6. If this is the first time you will be entering a record for this academic year, click on the **ADD A NEW ITEM** button.

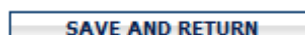
IMPORTANT! For correct reporting it is important that there is only one record for each academic year.

If you are editing an existing record, you will need to click the edit icon for that record.



7. Fill in the appropriate fields

8. When complete click on



¹ If you are an Admin user and you don't have access to the Activity Insight link, please contact the Activity Insight Coordinator to request access at facultyevaluation@apu.edu.

Note: The field titled “Administration Notes^H” is a hidden field to the faculty user. The purpose of this field is to allow notations that are only for administration to see.

Administration Notes ^H

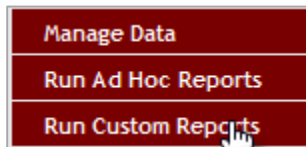
on 8/15/12 - Teaching units increase from 24 to 27



Build Reports for Workload in Activity Insight

Once workloads are entered, reports can be generated for a department or school.

1. Click on Custom Reports



2. Choose the report to run from the drop down and follow the steps below

Run a Report

1
 Select the report to run.
 Workload Report - University /School / Department Summary
 Details of how this report is built...

2
 Select the date range to use.
 Start Date Sep 01 2013
 End Date Aug 31 2014
 only adjust year drop-down

3
 Select whom to include.
 Click here to select whose data to include.
 Data selected: College of Liberal Arts and Sciences
 Include these accounts: Enabled Accounts Only
 Leave this as is

4
 Select report options.
 a) Running report for... *
 Department
 Department
 School
 University
 Legend: * Required

5
 Select the file format.
 Adobe PDF

6
 Select the page size.
 Letter

7
 BUILD REPORT

Need Assistance?

Contact the Office of Faculty Evaluation facultyevaluation@apu.edu